SETU E-Recruit Manager Guidelines

July 2024 Version 1.C



Ollscoil Teicneolaíochta an Oirdheiscirt

South East Technological University



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1. Create a Staff Request

- 1. Using Google Chrome log in to Core Portal.
- 2. Select the Manager Dashboard.
- 3. Click on Recruitment on the left-hand menu and select "View" on the Staff Request widget.

\equiv Manager Dashboard \cdot		Q Search Dashboards or Widgets
	Staff Requests	
Manager Dashboard	Staff Requests	VIEW
😩 My Team		
Approvals Requests		
+ Recruitment		in the second
		2

- 4. On the next screen you will be able to perform the following three actions:
 - 1. View **My Requests** and filter requests by planned, submitted, on-hold, approved, complete, rejected.
 - 2. View staff requests awaiting your approval My Approvals.
 - 3. Create a new staff request.

← Manager Dashboard				
Staff Requests Manager Dashboard > Staff Requests				CREATE NEW REQUEST
My Requests	My Requests Breakdown	My Requests		_
. My Approvals	Pfanned: 0 Submitted: 0 On-hold: 0	Search Staff Requests Q Request No Request Date	Planned * All Planned	epartment
	Approved: 0 Complete: 25 Rejected: 5		Submitted On-hold Approved	
			Complete Rejected	

5. Click on the **Create New Request** button on the top right-hand corner of the screen:



6. Complete the information for each screen 1-6 of the staff request form as follows:

Important point to note: The system <u>does not save</u> the details in screens 1-6 of the staff request until you click <u>Save</u> in screen 7 (Summary). Therefore, if you click the back button on the web browser before you have reached screen 7, <u>any data you have entered will be lost</u>.

Screen 1: Position

ew Staff Request anager Dashboard > Staff Re	quests > New Staff Request				
1 Position	Structure Default Standard Structure				
2 Contract	Hierarchy				
3 Job Details	Company×	•	Management Unit*	Department *	
4 Vacancy Details	Non-hierarchy		Location*	Division	
5 Documents	con centre -		LOUBERT !	LTTOPART.	<u> </u>
6 Cost Allocations					
7 Summary					
					as Promiti D

Field	Description	Mandatory/ Optional	Feeds into the vacancy?
Structure	This will always be "Default Standard Structure"	N/A	N/A
Hierarchy			
Company	South East Technological University	Mandatory	Y
Management Unit	Choose appropriate Management Unit for the vacancy from the drop-down list	Mandatory	Y
Department	Choose appropriate Department for the vacancy from the drop-down list	Mandatory	Y
Cost Centre	Choose correct cost centre from the drop-down list	Mandatory	Y
Non-hierarchy			
Division	THIS FIELD IS NOT IN USE	N/A	N/A
Location	Choose appropriate location for the vacancy from the drop- down list	Mandatory	Y



Screen 2: Contract

	Staff Request	ests > New Staff Request					
1	Position	Contract Duration Date Request Submitted * 02-Feb-2023	Planned Start Date*	Planned End Date	Contract Duration		
2	Contract	Category & Status					
3	Job Details	Employee Status * •	-				
	Vacancy Details	Contract Details					
	Documents Cost Allocations	If part-time, specify days and am/pm	Weekly Hours*	FTE*	Positions Required *	<u>.</u>	
	Summary						
							PREVIOUS

Field	Description	Mandatory/ Optional	Feeds into the vacancy?
Contract Duration			
Request Date	Enter date of request (i.e. today's date)	Mandatory	Y
Planned Start Date	Enter the Planned Start Date for the vacancy	Mandatory	N
Planned End Date	Enter the Planned End Date for the vacancy if known	Optional	Ν
Contract Duration	E.g. Permanent, 12 months, etc.	Optional	N
Category & Status			
Employee Status	 Choose the appropriate Employee Status from the following options: Casual Part-time (E.g. Associate Lecturers) Permanent Whole time (Permanent, full time hours) Pro Rata Part-time Specified Purpose (e.g. maternity cover) Temporary Part-time (Temporary but less than full time hours) Temporary Whole time (Temporary, full time hours) 	Mandatory	Ν
Contract Details			•
Part Time	If part time, specify days and am/pm	Optional	N
Hours	Enter the weekly hours for the post, e.g. 35 hours (full time professional services staff), 16 hours (full time Lecturers, 18 hours (full time Assistant Lecturers), etc.	Mandatory	Y
FTE (Full Time Equivalent)	Enter the correct FTE for the post FTE = # weekly hours for post recorded in the Hours field divided by total weekly hours possible for the post: Examples	Mandatory	Y

	Lecturer post - 16 hours per week FTE = 16/16 = 1 Assistant Lecturer post - 18 hours per week FTE = 18/18 = 1 Pro Rata Lecturer post - 10 hours per week FTE = 10/18 = 0.555 PMSS Grade IV post - 12 hours per week FTE = 12/35 = 0.343 PMSS Technician post - 20 hours per week FTE = 20/36.5 = 0.548		
Positions required?	Record how many people will be hired from the vacancy	Mandatory	Y

Click on Next

Screen 3: Job Details

New Staff Request Manager Dathboard > Staff Rev	bests > New Staff Request		
1 Position	Job Tribe* -		
2 Contract	Outline of Role (Note: Text in this field will appear on the external website) *	NO OF B I Tr □ Ξ □ 60	•
3 Job Details			
4 Vacancy Details			
5 Documents			100% remaining
6 Cost Allocations	Title for Advert (can be different to job titl*		
7 Summary			
		PREMICUS	NEXT

Field	Description	Mandatory/ Optional	Feeds into the vacancy?
Job Title	Select the job title from the drop-down list of job titles in the Core database. Partially typing the job title text will help to narrow down your search. If the exact job title you are seeking isn't available in the drop- down list you can request HR to add the new job title to the database. You will also have an opportunity to enter the exact job title for the role in the Title for Advert field.	Mandatory	Y
Outline of role	Enter a brief outline of the role (2-3 lines), including a Job Overview and Key Responsibilities or Duties . This will display	Mandatory	Ŷ

	on the external site if not amended before the vacancy is advertised.		
Title for Advert	This is the Vacancy Title that will display on the external advert and can differ from the job title selected above if required. <u>NB: The Vacancy Title will also appear the</u> <u>list of vacancies in the recruitment widget.</u>	Mandatory	Y
Additional Information	Use this field to record any additional information in relation to the vacancy.	Optional	Ν
Person Shortlisting	Use this field to document who will be shortlisting the vacancy.	Mandatory	N

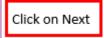
Click on Next

Screen 4: Vacancy Details

Position	Vacancy Details	
Contract	Vacancy Category* Position Type*	
Job Details	Other Information	
500 00000	Grade and Salary (Research Posts)	
Vacancy Details	Background to this request (Replacing whom, New post, funding defails, etc.)*	
Documents		
Documents		
Cost Allocations		
Cost Allocations		
		100
Cost Allocations		100

Field	Description	Mandatory/ Optional	Feeds into the vacancy?			
Vacancy Details						
Vacancy Type	NB: Please take care to select for the Vacancy Type field as the where the staff request is rout Please see table below for guid correct option to select for field:	Mandatory	Y			
Staff Requester		Correct Vacancy Type option to choose				
Carlow Campus Manag	ers	CARLOW CAMPUS STAFF REQUESTS				
Head of Department		Academic				
Head of School		HOS Request				
Head of Function and F	Research Centre	Managerial, Administration and Support				
Principal Investigator		Research				

VPs		Senior Management		
Walton Institute		TSSG		
Position Type	Select from one of the followin drop-down list: A. New Position B. Job Share C. Vacancy D. Secondment E. Career Break F. Replacement G. Acting Secondment H. Internship	ng options on the	Mandatory	Y
Other Information				
Grade and Salary (Research Posts only)	Enter a figure for salary if t belong to the normal grading s	-	Optional	Y
Background to this request	Provide as much detail regard possible, including whom it is new post, funder details, etc.	•	Mandatory	Ν

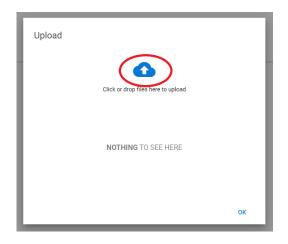


Screen 5: Documents

Step 1: Choose Upload

New Staff Request Manager Dashboard > Staf	t ff Requests > New Staff Request		
1 Position	Documents		UPLOAD
2 Contract	Description	East tokened	
3 Job Details			
Vacancy Details			
5 Documents			
6 Cost Allocations		NOTHING TO SEE HERE EXCEPTIVE RAG	
7 Summary			
		Charactera The part of the	PREVIOUS

Step 2: Click on the arrow above <u>Click or drop files here to upload</u>



Step 3: Locate the file you wish to upload on the network drive and select Open

) Open									>
← → × ↑ 🖺 > This PC	Documents					ٽ ~		ments	
Organize 🔻 New folder									?
Quick access Documents Downloads	* * * * * * * * * * * * * * * *	Name Custom Office Templates My Data Sources My Shapes	Date modified 14/02/2022 12:41 09/05/2022 12:25 21/02/2022 13:00	Type File folder File folder File folder	Size				
File name:							All Files (*.*)		~

On the next screen, click on **OK** and check if the file has uploaded correctly:

Upload	
6	
Click or drop files here to upload	
Assistant Lecturer Job Description Templat 58kB (Upload Complete)	Û
	ОК

Position	Documents		UPLOA
Contract	Description	Date Liploaded	DECO
Job Details	SETU Carlow People Management User Guide - v1.0.docx	02 Feb-2023	
Vacancy Details			
Documents			
Cost Allocations			
Summary			
			PREVIOUS

Screen 6: Cost Allocations

New Staff Request Manager Dashboard > Staff	lequests > New Staff Request				
Position	Funding Source*	If Non-Core Funded, please give details:			
2 Contract					
Job Details					
Vacancy Details					
5 Documents					
6 Cost Alecations					
7 Summary					
			O Access Prov		PREVIOUS

Field	Description	Mandatory/ Optional	Feeds into the vacancy?
Funding Source	Choose appropriate option (i.e. Core/Exchequer Funded or Non-Core Funding Source).	Mandatory	N
If Non-Core Funded, please give details:	If Non-Core Funding Source has been selected for the Funding Source field, please give details of non-core funding in this free text field.	Optional	Ν

Screen 7: Summary

At this stage of completing the form, screens with incomplete fields will be highlighted in red in the lefthand menu.

Note: if all mandatory fields are not completed, the system will not allow you to submit the request.

• Click 'Save' on the Summary page (Screen 7).

	Request Summary			
Position	Planned Start Date *	Vacancy Category *	PTE 1	Job Title *
	01/09/22 Department *	Location *	1 Positions Required *	Lecturer Grade
Contract	Applied Sciences	Carlow Campus	1	
Vacancy Details				
Documents				
Summary				

On the "Save and Submit" dialog box on the next screen:

- Choose Option 1 "No" if you are not yet ready to submit the request for approval. The request can be accessed from the Manager Dashboard > Recruitment > Staff Requests (View) > My Requests and filtering by 'Planned'. Click on the ellipsis beside the relevant request and choose Edit.
- Choose Option 2 "Yes" if you are ready to submit the staff request for approval. This submits
 the staff request to the first stage of the Staff Request workflow you have selected in Screen 4 >
 Vacancy Details > Vacancy Type field. A message will display to say the request was submitted
 successfully.

Check the approval status of a staff request

- Portal > Manager Dashboard > Recruitment > Staff Requests > View > My Requests > Filter by "submitted".
- Find request > click the 3 dots > View.
- Navigate to Screen 7 (Summary screen) and scroll down to the end.

You will be also be notified by email to Microsoft Outlook at each stage of the approval process.

Re-submit a staff request that has been rejected

- Portal > Manager Dashboard > Recruitment > Staff Requests > View > My Requests > My Requests > Filter by "rejected".
- Click the 3 dots beside the request you wish to amend > choose "Copy".
- Then filter by "planned" the request will be at the top of the list. Click the 3 dots beside the request > choose "Edit".
- Make the necessary amendments and submit.

Copy a previously approved staff request

- Portal > Manager Dashboard > Recruitment > Staff Requests > View > My Requests > My Requests > Filter by "approved" or "complete".
- Click the 3 dots beside the request you wish to copy > choose "Copy".
- Then filter by "planned" the request will be at the top of the list. Click the 3 dots beside the request > choose "Edit".
- Amend dates etc. as required and submit.

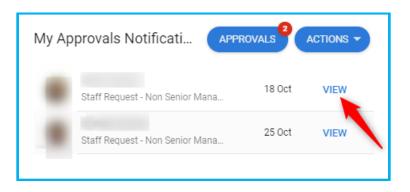
Links to Further Resources

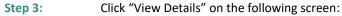
<u>E-Recruit Quick Reference Guide for Managers</u> Video – <u>Creating Staff Requests</u> (11:39 mins)

2. Approve a Staff Request

How to approve a Staff Request

- Step 1:To view the request that needs to be approved, log in to Core Portal using Google
Chrome via the SETU Homepage > Staff Hub > Access CoreHR > Core Portal button and
view Manager Dashboard > Approvals.
- Step 2: All staff requests appear in the "My Approvals Notifications" widget on the Manager Dashboard and the name of the person who requested the staff request will be shown - click on "view" to see the details.





My Approvals Manager Dashboard > My A	Approvais	4			1	VIEW DETAILS
Actions	Updates					
Search	Q =	Staff Request				
Staff Request	18 Oct	18 Oct 2019 17:28				
Staff Request	25 Oct	1910000321 Request Number	18-Oct-2019 Request Date			
		Job Title Sample Vacancy - Staff Request	Department	Company		
						REJECT APPROVE

- Step 4: View each screen 1-6 that have been completed by the staff requester.
- Step 5:On the summary page (Screen 7) choose Actions > Approve/Reject (as applicable) and
enter the approval or rejection comments when prompted. The Approval History for
the vacancy can be viewed at the bottom of this screen.

÷	Staff Requests								
	ew Approval (191000 nager Dashboard > Staff Requi	10300) ests > View Approval (1910000300)						-	ACTIONS A Approve
6	Position	Request Summary							Reject Print Preview
		Request ID		Planned Start Date *			Vacancy Type *		
		1910000300		01/11/19			Academic		
	Contract	Job Title * Jt Associate Lecturer		Department * School Of Busine	Department * School Of Business		Location		
					:55				
	Job Details	Post Number		Post FTE			Active FTE		
		000220		101			9		
		Number of candidates on panel?							
	Vacancy Details	Approval History							
	Documents	Date	Person		Action		Comments		
		18-Oct-2019	1000		Submitted				
	Summary		Company: Hr Manage	er	Pending				

- A message will display on screen to confirm the approval has completed successfully and a notification will automatically issue to the next Staff Request Approver in the process.
- Each approver will follow the same steps in order to approve the Staff Request.
- Once the final approver approves the request, a notification will issue to the person who submitted the Staff Request informing them it has been fully approved.